September 15, 2016
Tim Mahoney
Chief Marketing Officer
Global Chevrolet

Timothy J. Mahoney serves as Chief Marketing Officer Global Chevrolet and Global GM Marketing Operations Leader General Motors Company. With more than 30 years of automotive industry marketing experience, Mahoney has successfully managed and led teams in nearly every aspect of the category—from Research and Planning to Product Management and from Marketing Communications to Customer Dealer Service.

Prior to joining Chevrolet, Tim Mahoney was the Chief Product and Marketing Officer for Volkswagen. Tim ranked #3 on the list of the world’s 50 most influential CMOs, as determined by Forbes Magazine, Nov 2014. He was appointed Chief Marketing Officer Global Chevrolet and Global GM Marketing Operations Leader in April 2013.

Reservations are required. You may register on-line: FOF Meeting Registration or contact Judy Adair judy-adair@utulsa.edu or 918-631-2588. Friends of Finance members will have preference until September 1, 2016.

October 16, 2016
Maynard Holt
Co-President
Tudor, Pickering, Holt & Co.

Maynard Holt serves as Co-President of Tudor, Pickering, Holt and Company and leads the firm’s upstream advisory business. Mr. Holt was previously a Managing Director with Goldman, Sachs & Co. where he worked in Leveraged and Structured Finance and Energy & Power / Natural Resources. Holt holds a BA in Economics and Russian from Rice University and an MBA in Public Policy from the John F. Kennedy School of Government at Harvard University.

Reservations are required. You may register on-line: FOF Meeting Registration or contact Judy Adair judy-adair@utulsa.edu or 918-631-2588. Friends of Finance members will have preference until October 4, 2016.

Meeting Sponsor

We extend our thanks and appreciation to WPX Energy for serving as our Luncheon Sponsor.

Meeting Sponsors

Burt B. Holmes
and
Mary Lee Townsend

We extend our thanks and appreciation to Burt B. Holmes and Mary Lee Townsend for serving as our Luncheon Sponsors.
University of Tulsa
Friends of Finance
2016-2017
Executive Speaker Series Luncheons

**Tim Mahoney**
Chief Marketing Officer
Global Chevrolet
September 15, 2016
Sponsored by:
Burt B. Holmes & Mary Lee Townsend

**Maynard Holt**
Co-President
Tudor, Pickering, Holt & Co.
October 18, 2016
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**Michael Skelly**
President
Clean Line Energy
November 16, 2016

**Craig Jones**
President
Oklahoma Hospital Assn.
January 20, 2017
Sponsored by:

**Bob Zapfel**
President
Xerox Services
February 16, 2017

TBA
March 2017

TBA
April 2017

TBA
May 2017
Finance Faculty News

Matthew Crook and Brian Walkup, Assistant Professors of Finance, recently had an article accepted for publication in the Journal of Financial Research. The article is titled “Rankings and Trends in Finance Publishing: An Iterative Approach.”

In the article, Dr. Crook and Dr. Walkup develop a new method for ranking academic journals, universities, and doctoral programs using an iterative loop ranking system. The system updates internally requiring less dependence on outside inputs, thus improving on prior ranking methods. They base the rankings on a large, hand-collected dataset consisting of information on all articles published in 20 finance journals over a 30 year period.

In addition to the ranking system developed in the paper, Dr. Crook and Dr. Walkup explore trends that have occurred in the finance publishing environment across the 30 years in the dataset. They document a number of shifts including an increase in internationalization and an increase in co-authorship. Across time, the number of international universities in the Top 50 rankings has increased substantially. Improvements in technology allow greater access to co-authors at a distance, resulting in increases in the number of authors per paper and the probability that co-authors are located at different universities.

The extensive dataset was collected by a series of graduate research assistants; Dr. Crook and Dr. Walkup plan to use their unique dataset for a number of other projects in the future.

Welcome New Faculty Member

Svetlana Orlova received her Ph.D. in Business Administration with a concentration in Finance at Oklahoma State University in December of 2014. Prior to joining the University of Tulsa she worked as a Visiting Assistant Professor at Ohio University. Svetlana received a MBA degree with a concentration in Finance in 2005 from Northern Arizona University, and accepted an offer from Intel Corporation for the position of a Senior Finance Analyst in a division that manages the majority of Intel’s commercial contracts with suppliers. However, because of her strong desire for teaching and research, Svetlana decided to pursue a Ph.D. degree. Prior to working at Intel, Svetlana also worked several years for Chevron-Kazakhstan JV “Tengizchevroil” in Tengiz, Kazakhstan.

Her research interests include corporate, behavioral, and international finance with primary focus on capital structure and corporate cash holdings topics.

Roger P. Bey Scholarship Recipient Profile

Evan Brugger is currently a MS in Finance student at TU, graduating in 2017. Evan graduated as a Finance major in 2014 and went to work for Mariner Wealth Advisors. “After spending a few years at Mariner, the experience opened up other paths I wanted to pursue in Finance. As an MSF student, you are able to define your degree through your choice of program tracks that best suit your goals.”

With a goal towards entering the private equity or venture capital areas, Evan has developed an interest in valuation, but also corporate policy. “Dr. Walkup’s class deepened my knowledge of corporate policy and incentives involved with corporate decisions. In addition, a deeper study of portfolio theory has been the highlight of the program thus far. Both have helped me develop critical thinking skills that will help me throughout my career.”

“The Bey Finance Scholarship made my pursuit of a graduate degree at TU an accessible reality. I know I will receive a great return on the investment of going back to school, and my graduate scholarship made this a deal I could not pass up.”
2015-2016
Finance Excellence Fund

Thanks to the amazing support of FOF members and friends, we raised $151,955 from 110 donors. On behalf of all future students who will benefit from scholarships and an improved School of Finance, Operations Management, and International Business as a result of your giving, Thank you!

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Joel Harper         Mike Huckaby

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Membership

Last year we had membership of 388. This year our membership goal is 500. If you are a TU graduate within the last twelve months, your membership fee is only $10. If you live outside of the Tulsa area (more than 50 miles) your membership fee is only $10.

Membership fees support all of the expenses associated with Friends of Finance. To renew your membership or join, go to Membership Application. Encourage your friends and colleagues to do the same. Friends of Finance is the largest and strongest finance group in Oklahoma and the Southwest. Members since our last newsletter are below. Members to date (194) are:

- Judy Adair
- Carl Daugherty
- Allen Humbolt
- Garrett Mills
- Mark Smith
- Joe Adwon
- Jeff Davis
- Jeff Husen
- Jerry Morris
- Bill Snow
- Nick Allen
- Keith Diekelman
- Robert Hutton
- Rick Muncrief
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- Ken Dornblaser
- Jeff James
- Jamie Nunez
- Dr. Tom Stees
- John Arens
- Del Dreyer
- Larry Johnson
- Svetlana Orlova
- Scott Stidham
- Keith Bailey
- Frederick Drummond
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- Pete Stonis
- Tory Baker
- David Eastin
- James Kelley
- Tom Owens
- David Stratton
- Michael Balp
- Brian Elliott
- Joe Kidwell
- Daniel Owens
- Gale Sullenberger
- Patrick Bardsley
- Bill Fader
- Natalie Killingsworth
- David Page
- Richard Sullivan
- Allen Barrow
- Ed Fariss
- Amanda Troxell
- Crystal Parrett
- Hugh Taylor
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- Erik Feighner
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- Gavin Pearson
- Bill Thomas
- Doug Beineman
- Bob Fitzgerald
- Kyle King
- Brian Pillmore
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- Roger Bey
- Debbie Fleming
- Jim Kiser
- Jack Koehle
- Bob Redman
- Tim Tolin
- Patty Bick
- David Fleske
- Jack Koehle
- Roberta Preston
- Bob Traband
- Terry Biehl
- Greg Ford
- Angela Koupelen
- Britt Radford
- Kelly Tronzo
- Jill Bond
- Bob Fouch
- Marvin Krueger
- Kyle Radtke
- Stuart Turner
- Phi Boyle
- Randy Fouch
- Deborah Lackey
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- Tim Urban
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- Robert Rainey
- Kent Van Valkenburgh
- Richard Burgess
- Bob Fredrickson
- Sandy Leeds
- Joe Redman
- James Vaughan
- Rick Buterbaugh
- Curtis French
- Barbarae Limbrick
- Tom Redman
- David Veitch
- Brian Cantrell
- Steve Ganzkow
- John Lindsay
- Phil Reedy
- Cal Vogt
- Steve Care
- Jessica George
- Ann Lowry
- Derek Reiners
- Jon Vrooman
- Wen Chiang
- James Gifford
- Andy Mackay
- Robert Reins
- Brian Walkup
- Mike Clark
- Curtis Gimlin
- Marcia MacLeod
- Harvie Roe
- Bob West
- Andrew Coffey
- Ashley Griffin
- Anila Madhan
- Jim Rogers
- Stan White
- Joshua Cole
- William Grimm
- Tammie Maloney
- Brad Rollins
- Meg Whitney Gentry
- Trey Cooper
- Joel Harper
- Tyler Maness
- Patrick Rooney
- Steve Wilkerson
- Megan Cordle
- Scott Hastings
- Adam Marshall
- Lori Rowan
- Tom Wilkins
- Jeff Couch
- Hans Helmerich
- Geordie Matson
- Bob Russell
- Scot Williams
- Joseph Craft
- Jim Hicks
- Marc Maun
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- Bretton Crane
- Ralph Hill
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- Alex Schneider
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- Rick Huck
- Jason McGlynn
- Julie Skye
- Claire Zhang
- Harry Dandelles
- Dan Hughes
- Nick McVey
- Julie Smith
- Andrew Ziola
**Fees**

**Fees for the 2016-2017 year**

- $250  (Membership + all remaining luncheon fees)
- $75   (Tulsa area members - membership fee only)
- $10   (out-of-area members - outside 50 mile radius of Tulsa)
- $10   (current TU full-time student or TU graduate within the last year)
- $525  (Membership plus all remaining luncheon fees for yourself and one guest)
- $2,500 One reserved table (8 seats) at each luncheon

**Leadership**

Our Friends of Finance officers and directors for 2015-2016 are:

**Officers**
- President: Marcia MacLeod
- VP Programs: Andrew Ziola, ONE Gas
- Treasurer: Roberta Preston, Girl Scouts of Eastern Oklahoma
- Secretary: Phil Reedy
- FEF Chair: Don Quint, Quint & Associates
- Membership: Megan Cordle, Alliance Resource Partners

**Directors**
- Shawn Crisp, Trust Company of Oklahoma
- Joel Harper, University of Tulsa
- Marc Maun, BOK Financial
- Greg Oliphant, Ceja Corporation
- Mike Osborne
- Kala Sharp, ONEOK, Inc.
- Frank Rhoades, Rhoades Oil Company
- Gale Sullenberger, University of Tulsa

**Shuttle Service**

918 Shuttle Service will provide shuttle service from the parking lots along Gary Place to the Allen Chapman Student Center between 11:00 a.m. and 2:00 p.m. See [University of Tulsa Parking Map](http://www.utulsa.edu/parking) for a campus parking map. Please let us know if you have questions.

**FOF Membership Committee**

Many thanks to the following members for volunteering to be a part of the 2015-2016 Friends of Finance Membership Committee. The Membership Committee promotes membership, plans and runs the Members Only functions, and facilitates check-in at the Executive luncheons.

- Megan Cordle, Alliance Resource Partners (Chair)
- Brad Beeson, J.P. Morgan
- Tom Campbell, Campbell Organization
- Bruce Currie, MidFirst Bank
- TD Eureste, ONEOK
- Curtis French, Phillips 66
- Chris Guglielmo, Williams
- Jeff Husen, ONE Gas
- James Kelley, Rowland Group
- Ann Lowry, Accounting Principals
- Jason Maloney, Hogan Taylor
- Gavin Pearson, Bank of Oklahoma
- Kysa Rowe, WPX Energy
- Charles Secrest, Key Personnel
- Julie Skye, Mariner Wealth Advisors
- Philip Viles, Jr., University of Tulsa

**FOF Web Site**

The FOF website [www.utulsa.edu/fof/](http://www.utulsa.edu/fof/) includes a number of services as listed below. It also has an excellent short video on the organization and the Student Investment Fund.

**New Membership**

[Membership](http://www.collins.utulsa.edu/secure/fof/Members/login.aspx) ([Restricted](http://www.collins.utulsa.edu/secure/fof/Members/login.aspx) to FOF members and requires a user name and password which you obtain when you join or renew your membership). After signing in, you may go to:

**Membership Directory**

A listing of all FOF members is provided. Contact information is available only if members agree to have it posted.
Executive Luncheon Sponsors

If your firm would like to gain some additional recognition and support FOF, it is now possible to be designated as a Friends of Finance Executive Luncheon Sponsor. A Luncheon Sponsor receives recognition in our newsletter, recognition at the meeting on PowerPoint slides prior to the meeting, recognition from the podium, and a table for eight at one luncheon with preferential seating. At least one member of the sponsoring firm will be seated at the Head Table with the speaker. The Luncheon Sponsorship is for one meeting. The cost to sponsor the luncheon is $2,500. Contact Judy Adair (judy-adair@utulsa.edu or 918-631-2588) if you are interested in being a Luncheon Sponsor.

Take-A-Student to Lunch

One goal of Friends of Finance is to assist our students. Assistance may be in the form of employment advice, employment opportunities, and mentoring. In support of this, members and their firms may participate through our Take-A-Student to lunch program. Just contact Judy Adair at 631-2588 or judy-adair@utulsa.edu and tell her how many students you would like to host. She will arrange for the student(s) to meet you at the registration desk for the luncheon. Please ask for the student(s) when you check in.

Affiliate Programs

Tulsa’s Young Professionals

Giving Tulsa’s Young Professionals a voice. A voice in our community. A voice in the business community and ultimately, a voice in our future.

Tulsa’s Young Professionals is a quality group of diverse young professionals working together to showcase Tulsa as a cool place to live, work and play. TYPros provides its members with opportunities to get in front of and build relationships with local community and business leaders.

Not only does TYPros give young professionals a voice - it gives them an outlet for affecting change in the Tulsa community. TYPros seeks to work hand-in-hand with current community and business leaders to learn from their experiences and to create a young professional-friendly atmosphere.

For more information, go to: http://www.typros.org/

NAIC
Greater Tulsa Area Chapter, BetterInvesting
Educational Classes
Better Investing Member’s Day Out
9/10/2016, 10:00 am - 12:30 pm

Herman & Kate Kaiser Library
5202 Hudson Ave
Tulsa, Oklahoma

NAIC Contact:
contact@tulsa.betterinvesting.net
Corporate Sponsors

A Corporate Sponsorship provides a table for eight at each luncheon with preferential seating; recognition in each newsletter; recognition at each meeting on PowerPoint slides prior to the start of each luncheon, a listing on a display board at each luncheon, and recognition from the podium at a number of the luncheons.

To ensure that individual members have adequate seating the Board has limited the number of Corporate Sponsors to fifteen. If you are interested in having your company participate, contact Judy Adair at 918-631-2588 or judy-adair@utulsa.edu for details. Corporate Sponsors for this year are: